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# Foreign Crops and MARKETS



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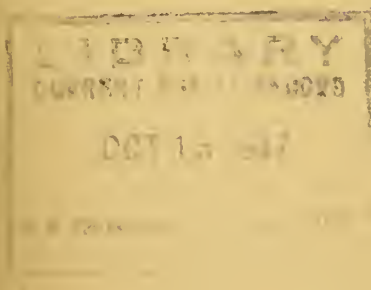
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FOR RELEASE

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

## L A T E   N E W S

Meat rationing in Denmark was re-established September 17. It had been suspended, beginning August 27, because of exceptionally heavy slaughterings, resulting from the recent drought. Slaughterings, although very high, have declined.

- - - -

British Columbia exported 247 carloads (197,000 boxes) of packed apples from the 1947 crop to the United States for fresh use, according to British Columbia Tree Fruits, Ltd., the official marketing agency of the Province. Of the 247 cars, 213 were of the McIntosh variety, 21 Wealthy, 7 Red Delicious, 5 Jonathan, and 1 mixed car of McIntosh and Winter Banana.

The cars were shipped to 26 States, Wisconsin receiving the largest number 53 cars. Other States receiving over 5 cars were: Illinois, 46, Minnesota 31, Massachusetts 21, Michigan 20, New York 15, North Dakota 10, Iowa 6 and South Carolina 6.

According to the September 29 Fruit Crop Report of Canada, reporting conditions as of September 15, the British Columbia estimate of the current season's production of packed apples declined to 7,623,000 bushels, a drop of 160,000 bushels below the August figure.

- - - -

Finland expects to import about 60,000 bushels of apples from Denmark, according to the terms of a commercial agreement recently signed.

- - - -

Argentina's milk flow is not expected to reach flush season levels until late October, about a month behind schedule. Continued cold weather affected pastures in the important dairy Provinces of Cordoba and Santa Fe, which were not restored at the opening of the new season by the light rains of late August.

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## WORLD CORN CROP ABOUT AVERAGE

World corn production in 1947-48 is forecast at about 4.8 billion bushels, on the basis of information on early season prospects available to the Office of Foreign Agricultural Relations. Production, at that level, would be around the prewar average of 4.7 billion, but about 12 percent less than last year's record production. The poor prospects for the United States crop account for the decline, with the current outturn in this country estimated to be down one-fourth from the 1946 production.

Corn production in other important producing areas of the Northern Hemisphere is expected to be somewhat larger than in 1946, principally as a result of large increases in Europe and the Soviet Union. Improvement in Europe is largely in the Balkan area, while western Europe's crop is little larger than the poor 1946 harvest, thus contributing to the already critical grain shortage of that area. Production within present boundaries of the Soviet Union is estimated to be almost up to the 1935-39 average, and much larger than in 1946.

Since corn planting is just getting well underway in the Southern Hemisphere, it is too early to have estimates for individual countries, and the allowances made for that area are highly tentative. Even with some acreage increase indicated, the area planted would still be comparatively small, and yields would have to be well above average to bring production near average.

The current crop in North and Central America is now estimated at 2.6 billion bushels, of which the United States production represents 94 percent. That continental total contrasts with the record 1946 crop of 3.5 billion bushels, though still about 5 percent above the 1935-39 average. The United States crop (September estimate) of 2.4 billion bushels would be the smallest crop since 1936 and considerably below the 3.1 billion bushel average for the past 5 years. Weather conditions in the United States corn belt since September 1 will be taken into account in the October estimate, which will be released too late for inclusion in this summary. The 1947 acreage shows a 5 percent reduction from the 1946 figure, while yields are indicated to be almost 25 percent below the record yields in 1946.

In Mexico, the second country of importance for corn production in this area, production is forecast at 85 million bushels, compared with the 1935-39 average of 68 million and the 1946 harvest of 94 million. A small increase in acreage is reported, as well as some increase in yields, compared with average. Both acreage and yields show a small decline from those of a year ago, however. In order to reduce the import needs in 1948, the Mexican Government planned to encourage late plantings of corn at low altitudes.

The corn crop in Europe is estimated at 655 million, 68 percent above the low 1946 level of 390 million. Estimates for Europe consider only the territory now under European administration. Territory acquired by the Soviet Union is included in the estimate for that area. The most favorable outturns in Europe were reported for the Balkan area, with substantial increases reported for all countries. In Rumania, where last year's corn crop was a virtual failure, the 1947 production is reported to be larger than the average for 1935-39 and more than three times as large as in 1946.

(Text Continued on Page 247; Table Follows)



Continent and country	Acreage		Yield per acre		Average		Production	
	1935-39	1945	1946	1947	1935-39	1946	1945	1946
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
<b>North and Central America:</b>								
Canada.....	172	237	252	176	40.8	43.7	42.3	35.8
Guatemala.....	1,000	1,200	-	-	15.7	14.9	-	-
Honduras.....	258	-	-	-	14.0	-	-	-
Mexico.....	7,501	8,527	8,186	8,154	9.0	10.1	11.5	10.4
Nicaragua.....	86	199	150	150	17.4	17.8	13.0	16.7
United States.....	92,599	88,079	88,718	84,311	25.0	32.7	37.1	28.5
Cuba.....	360	360	400	400	16.7	14.5	15.6	16.3
Estimated total	103,130	100,210	100,540	96,020	-	-	-	-
<b>Europe:</b>								
Albania.....	235	205	250	250	21.6	16.6	24.0	21.6
Austria.....	163	-	-	-	41.3	-	-	-
Bulgaria.....	1,733	1,798	1,992	1,879	18.0	5.1	9.8	14.9
Czechoslovakia.....	395	350	340	360	28.6	-	23.5	27.8
France.....	839	529	603	675	26.9	11.9	16.6	14.8
Germany.....	85	-	-	-	47.1	-	-	-
Greece.....	650	509	653	700	15.5	12.4	12.1	14.3
Hungary.....	2,925	3,016	3,110	2,500	31.5	24.4	17.6	29.3
Italy.....	3,595	3,350	3,200	3,200	31.5	20.9	27.1	28.9
Portugal.....	997	1,089	1,320	1,310	13.1	11.2	12.7	12.0
Rumania.....	9,870	-	-	-	17.4	-	-	-
Spain.....	1,086	872	915	990	26.7	21.3	22.7	23.8
Yugoslavia.....	6,615	-	-	-	26.7	-	-	-
Estimated total	29,200	25,730	26,400	28,520	-	-	-	-
<b>U.S.S.R. (Europe and Asia):</b>								
10,000	-	-	-	-	-	-	-	-
<b>Asia:</b>								
Turkey.....	1,098	1,428	1,260	1,360	20.9	8.1	18.6	16.2
Burma.....	217	-	-	-	7.6	-	-	-
China.....	12,000	14,200	14,200	14,000	21.8	22.2	21.5	21.1
Manchuria.....	3,720	7,705	-	-	23.3	21.1	-	-
French Indochina.....	1,019	-	-	-	20.8	-	-	-
India.....	8,265	10,690	10,555	10,050	13.1	12.3	11.9	11.4
Japan.....	128	-	-	-	23.6	-	-	-
Korea.....	321	-	-	-	13.0	-	-	-
Java and Madura.....	5,150	-	-	-	15.5	-	-	-
Philippine Islands.....	1,718	-	1,291	1,483	9.4	-	9.2	11.7
Estimated total	33,830	42,050	39,300	38,850	-	-	-	-
655,000	-	-	-	-	-	-	-	-

South America:

Argentina.....	10,775	6,461	6,431	-	28.0	21.8	35.6	-	301,986	140,701	228,924
Brazil.....	10,025	-	-	-	21.5	-	-	-	215,153	248,647	200,000
Chile.....	110	113	116	-	22.7	22.6	21.6	-	2,496	2,549	2,500
Colombia.....	1,374	-	1,651	-	14.1	-	14.8	-	15,276	29,504	24,408
Uruguay.....	531	378	452	-	9.8	8.5	11.0	-	5,188	3,226	4,976

Estimated total £/...: 24,720 : 20,500 : 20,150 : 21,020 : - : - : 561,000 : 456,000 : 488,000 : 470,000

Africa:

Belgian Congo.....	e/ 179	-	-	-	e/ 27.9	-	-	-	5,000	-	-
Kenya d/.....	108	125	-	-	e/ 31.0	26.7	-	-	3,350	3,340	-
Basutoland.....	350	-	-	-	8.1	-	-	-	2,822	-	-
Egypt.....	1,599	1,950	1,716	1,715	39.5	34.3	32.6	35.0	63,229	66,821	55,980
French Morocco.....	1,112	1,280	1,290	1,260	7.6	1.3	6.1	6.7	8,505	1,700	7,900
French West Africa.....	e/ 1,732	-	-	-	e/ 12.4	-	-	-	21,473	-	-
Madagascar.....	260	235	222	-	15.3	10.4	10.0	-	3,969	2,441	2,213
Angola.....	e/ 1,427	-	-	-	e/ 9.2	-	-	-	13,084	-	-
Southern Rhodesia d/.....	268	-	-	-	22.1	-	-	-	5,923	-	-
Union of South Africa.....	6,909	6,267	7,387	-	11.6	10.3	11.1	-	80,132	64,754	81,786

Estimated total ..£/...: 18,140 : 18,250 : 19,240 : 19,280 : - : - : 259,000 : 237,000 : 250,000 : 255,000

Oceania:

Australia.....	314	236	275	-	22.4	24.3	21.8	-	7,030	5,741	6,000
New Zealand.....	7	7	6	-	45.4	50.0	45.8	-	318	350	275
Total.....	321	243	281	237	-	-	-	-	7,348	6,091	6,275

Estimated world total £/...: 219,600 : 215,500 : 214,400 : 214,300 : - : - : 4,730,000 : 5,018,000 : 5,395,000 : 4,755,000

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries, except as noted.

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which follow; thus, the crop harvested in the Northern Hemisphere in 1947 is combined with the Southern Hemisphere harvest which will begin early in 1948.

b/ Figures refer to harvested areas as far as possible.

c/ Yield per acre calculated from acreage and production data shown.

d/ Preliminary estimates in Northern Hemisphere countries; for the Southern Hemisphere where corn planting is not completed until the end of the year, tentative forecasts only.

e/ Average of less than 5 years.

f/ Estimated totals, which in the case of production are rounded to the nearest million, include allowances for any missing data for countries shown and for other producing countries not shown.

g/ Estimate not adjusted to take account of inclusion of Southern Dobrudja and is, therefore, not strictly comparable with estimates shown for later year.

h/ Figure for 1935 only.

i/ Figure for 1937 only.

j/ European cultivation only.



Both acreage and yields were reported to be above average. Yugoslavia also reports a crop larger than average and more than twice as large as in 1946. The gain is attributed to considerably better-than-average yields. Hungary and Bulgaria also show increases in production, though the crop is still below average, because yields were smaller than average in both countries. Acreage was also smaller in Hungary. Production in western Europe was below average despite moderate acreage increases caused by planting some winter-killed breadgrain acreage to corn.

Production within present boundaries of the Soviet Union is indicated to be near the prewar level and much larger than the small 1946 harvest. Weather conditions were much more favorable this year than last, and both acreage and yields appear to be near the prewar level.

The outturn in Asia is estimated to be above average, but slightly less than the 1946 crop. Some reduction in both acreage and yields is reported for China and India, which two countries account for more than 60 percent of the total for that Continent. The Philippine Islands, in contrast report some increase in acreage and better yields.

Not much change from the 1946 level is seen in Africa's acreage or production. Official reports are not available for many areas, however, and allowances made for those areas are, in many cases, based on only fragmentary information. In the Union of South Africa, the largest single producer of the area, planting is just beginning, and little information is available as to current prospects.

. In South America, of course, planting is also in the early stages, and official estimates are not yet available. A slight increase in acreage is forecast, and if average yields are obtained, the outturn would be little different from the 1946-47 production, which was somewhat below average. Argentina, normally the largest producer in this area, has reduced its corn acreage considerably since the 1935-39 period, when an average of 15,956,000 acres was planted and 10,775,000 acres harvested. No announcement has yet been made of the price to be paid for the 1947-48 crop, but producers' dissatisfaction with the present price paid by the Government is considered to be one of the handicaps to any substantial increase in acreage. Weather and soil conditions are reported favorable to planting. Moderately increased plantings are expected in Brazil, the other important producer in this area.

Corn is of minor importance in Oceania, Australia's average production being only 7 million bushels. Acreage for the crop now being planted is expected to be smaller than last year's acreage.

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This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C.M. Purves, R.L. Gastineau, Judith E. Downey, L. Volin and Theodora T. B. Mills.



## WORLD COTTON TRADE SHOWED SLIGHT INCREASE IN 1946-47

World export trade in cotton for the year ended July 31, 1947, is estimated at 9,466,000 bales (of 500 pounds gross) or about 3.5 percent higher than the revised figure of 9,147,000 bales for 1945-46. Exports in both postwar years were nearly 4 million bales less than the prewar average of about 13 million. Egypt and Brazil are the only exporting countries that reported any appreciable increase in cotton trade last year.

Exports from Mexico declined from 263,000 bales in 1945-46 to 189,000 last year largely as a result of a temporary restriction on cotton exports made effective in July 1946 and removed March 1, 1947.

Exports of 3,640,000 bales from the United States in 1946-47 were only 38,000 less than in 1945-46. Considerable increases were reported in exports to Germany, the United Kingdom, Japan, Belgium, Czechoslovakia, the Netherlands, Sweden, and several lesser importing countries. These increases, however, were more than offset by reductions in exports to France, China, Spain, Italy, Poland, and Yugoslavia.

Exports of 833,000 bales from India were almost equal to the 850,000 bales exported in 1945-46, but less than a third of the 1934-38 average of 2,746 thousand bales. Restrictions on cotton exports were in effect during the 1946-47 season until June 9, 1947, but exports during that period were little more than half of the quantities permitted by the quota.

Argentina's total was down to 57,000 bales in 1946-47 from 125,000 the previous year. Cotton exports have been subject to special permit since July 1946 because of three successive short crops and low stocks. Brazil's exports of 1,619,000 bales appear to be the highest on record, exceeding the 1945-46 total by 157,000 bales, but the 1946-47 figure is as yet subject to revision. Sharp increases were reported in exports to Belgium, Spain, France, and Italy, partly offset by smaller shipments to China and the United Kingdom. Exports from Peru declined from 425,000 in 1945-46 to 358,000 last year largely because stocks were depleted by early exports while production has remained at the reduced wartime level of about 300,000 bales.

Egypt's exports of 1,467,000 bales in 1946-47 were 70 percent greater than the 862,000 bales exported in 1945-46. Appreciable increases were reported in exports to India, the United States, China, and the European countries except France, Germany, Poland, Greece, and some smaller countries. Exports from other African areas were roughly equal to those of a year ago.

An estimate of 350,000 bales for exports from the Soviet Union in 1946-47 is based on incomplete data from countries importing Russian cotton and compared with a similar estimate of 400,000 bales for 1945-46.

The report is designed to show the quantities of cotton which producing countries have distributed beyond their national frontiers. Insofar as possible, reexports of cotton have been excluded. The total does not relate to net exports, however, since no deductions of imports have been made from the exports of producing countries such as the United States or India.

(Table on following page)

COTTON: World exports by countries of origin  
(In terms of 500-pound gross weight bales)

Country	Year beginning August 1						
	1940	1941	1942	1943	1944	1945	1946
	bales	bales	bales	bales	bales	bales	bales
<b>North America:</b>							
Mexico .....	36	25	26	31	125	263	189
United States .....	1,174	1,162	1,498	1,146	1,909	3,678	3,640
Others .....	22	23	22	31	13	29	7
Total .....	1,232	1,210	1,545	1,208	2,047	3,970	3,836
<b>Asia:</b>							
China .....	150	220	325	74	40	0	a/
India .....	1,715	841	134	277	317	850	833
Iran .....	91	22	0	a/	a/	a/	9
Iraq b/ .....	10	21	6	7	0	0	1
Turkey .....	50	50	50	36	34	a/	1
Others .....	146	80	99	112	75	45	14
Total .....	2,162	1,234	614	506	466	895	858
<b>South America:</b>							
Argentina .....	138	a/	15	47	43	125	57
Brazil .....	1,333	856	452	533	461	1,462	1,619
Paraguay .....	18	23	26	b/ 26	b/ 30	40	50
Peru .....	318	217	141	153	156	425	358
Others .....	a/	a/	a/	a/	0	0	0
Total .....	1,807	1,096	634	759	690	2,052	2,084
<b>Africa:</b>							
Anglo-Egyptian Sudan .....	265	449	74	295	330	280	200
Angola b/ .....	16	20	24	12	26	20	35
Belgian Congo b/ .....	c/ 82	118	149	191	138	171	197
British East Africa b/ .....	317	372	248	145	195	269	212
Egypt .....	709	1,107	384	794	804	862	1,467
French Equatorial Africa b/ ..	39	78	77	42	77	88	100
French West Africa b/ .....	7	18	18	a/	14	11	7
Mozambique b/ .....	23	31	66	71	110	100	80
Nigeria b/ .....	44	48	87	34	20	20	d/ 35
Others .....	7	4	5	8	12	8	5
Total .....	1,509	2,245	1,132	1,592	1,726	1,829	2,338
Other countries e/ .....	49	11	4	1	0	401	350
World total .....	6,759	5,796	3,930	4,066	4,929	9,147	9,466

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, reports of United States foreign service officers, results of office research and other information.

a/ Less than 500 bales. b/ Calendar years. c/ Ten months, March-December.

d/ Eight months, January-August. e/ Mostly from the Soviet Union.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, A.W. Palmer, P.K. Norris, and O.H. Barber.



# COMMODITY DEVELOPMENTS

## GRAINS, GRAIN PRODUCTS AND FEEDS

### CUBAN RICE CONSUMPTION EXCEEDS IMPORTS

Decreased imports of rice into Cuba since June have resulted in a seasonal reduction of stocks on hand. Those about September 1 were estimated roughly at 80 million pounds, or near a two-months' supply considered the minimum necessary for normal movement through trade channels. Arrivals of 13,034,000 pounds during August were the smallest since September 1946. From August 30 to September 26, imports equalled 18,837,000 pounds. All receipts during the two periods were from the United States.

Rice purchases picked up during the four weeks ended September 26. Purchases of 63 million pounds were principally of United States rice, with some Mexican and Nicaraguan. Prices c.i.f. Habana during the week ended September 26 ranged from \$8.25 per 100 pounds for Prolific, 35 percent broken, to \$12.00 for Rexora, 10 percent broken.

CUBA: Rice imports by months, August-July,  
1942-43 to 1946-47

Month	: 1942-43 :	: 1943-44 :	: 1944-45 :	: 1945-46 :	: 1946-47 :	: 1947-48 :
	: Million :	: Million :	: Million :	: Million :	: Million :	: Million :
	: pounds :	: pounds :	: pounds :	: pounds :	: pounds :	: pounds :
August	: 2 :	: 27 :	: 28 :	: 16 :	: 17 :	: 13 :
September	: 4 :	: 29 :	: 42 :	: 34 :	: 6 :	: a/ 19 :
October	: 8 :	: 62 :	: 48 :	: 55 :	: 18 :	: - :
November	: 6 :	: 30 :	: 61 :	: 39 :	: 29 :	: - :
December	: 52 :	: 34 :	: 38 :	: 59 :	: 55 :	: - :
January	: 60 :	: 36 :	: 48 :	: 48 :	: 43 :	: - :
February	: 53 :	: 35 :	: 39 :	: 39 :	: 30 :	: - :
March	: 22 :	: 44 :	: 33 :	: 31 :	: 75 :	: - :
April	: 8 :	: 33 :	: 21 :	: 34 :	: 77 :	: - :
May	: 27 :	: 26 :	: 24 :	: 19 :	: 44 :	: - :
June	: 23 :	: 19 :	: 15 :	: 20 :	: 55 :	: - :
July	: 44 :	: 46 :	: 22 :	: 34 :	: 22 :	: - :
Total	: 309 :	: 421 :	: 419 :	: 428 :	: 471 :	: - :

Compiled from ships' manifests. Arrivals are approximate and not strictly comparable with official trade data. a/ August 30 to September 26 only.

Cuba's monthly rice consumption before the war equalled about 40 million pounds, and the demand at the present time is considerably larger than that amount. Because of inability to obtain imports, however, consumption was below average during the first part of the 1946-47 (August-July) marketing year. The Cuban 1947 rice crop is forecast at 2,111,000 bushels (62 million pounds milled) compared with 1,756,000 (52 million pounds) in the preceding year. Rainy weather prevented some sowing in the Provinces of Matanzas and Las Villas, but fine weather since the planting season aided the crop to be harvested through November.



# PHILIPPINE RICE PRICES CONTINUE DECLINE

Prices of Philippine rice during the week ended September 19 were markedly below those of July and August. Milled No. 1 Macan, quoted at \$8.71 per 100 pounds, compared with \$13.16 in July 1947, and with \$22.48 per 100 pounds in September 1946.

Rice prices were extremely high in September 1946 as a result of scarcity following the war. When the new crop was marketed, prices dropped in January 1947 to around \$14.17 per 100 pounds, and continued to decline in the next few months, but rose again in July. Prices of domestic rice have declined steadily since July, however, while those of imported rice have remained at the level of prices paid.

PHILIPPINE ISLANDS: Rice prices, per 100 pounds, week ended September 19, with comparisons

	: Native, Macan milled:				:
Date	: ex-warehouse, Manila:		: NARIC		: Rough, delivered
	: No. 1	: No. 2	: No. 1	: Canabanutuan	
	: <u>Dollars</u>	: <u>Dollars</u>	: <u>Dollars</u>	: <u>Dollars</u>	
Sept. 1946 (average)	: 22.48	: 21.87	: 12.20	: -	
July 1947 - High	: 13.16	: 12.96	: 12.11	: 8.06	
" Low	: 12.55	: 12.15	: 12.11	:	: 7.81
August - High	: 12.96	: 12.55	: 12.11	:	: 7.81
" Low	: 11.54	: 10.93	: 12.11	:	: 7.06
Aug. 30-Sept. 5 High	: 11.74	: 11.34	: 12.11	:	: 7.31
" " " Low	: 11.14	: 10.53	: 12.11	:	: 6.55
Sept. 6-12-High	: 11.34	: 10.93	: 12.11	:	: 6.80
" " Low	: 9.92	: 9.31	: 12.11	:	: 5.80
Sept. 13-19-High	: 10.12	: 9.72	: 12.11	:	: 5.80
" " Low	: 8.71	: 8.10	: 12.11	:	: 5.29

From Daily Market Report, Bureau of Commerce. Philippine Government.

## TOBACCO

### BRAZIL'S TOBACCO CROP DOWN IN 1946-47

Unofficial information indicates that Brazil's 1946-47 tobacco crop totaled only about 180 million pounds, compared with the 1945-46 production of 261 million pounds. The States of Bahia and Rio Grande do Sul contain the country's most important tobacco-growing areas, and reduced crops in those States account for most of the decrease.

This year's Bahia crop was seriously affected by drought conditions and totaled only 45 million pounds - a reduction of 52 percent from the large 1945-46 outturn of 93 million. Most of Bahia's leaf consists of air-cured and cigar types used by domestic cigar manufacturers and for export to European countries. In Rio Grande, 1946-47 production is placed at only 66 million pounds, against 89 million last year. Rio Grande leaf is chiefly flue-cured and light air-cured tobacco used in the manufacture of cigarettes. This year production was about equally divided between the two types, each accounting for about 15 million pounds.

Exports of leaf tobacco from all Brazil totaled 116.5 million pounds in 1946. This was an all-time high for the country, which has been for many years one of the world's principal tobacco-exporting nations. The chief destinations were Spain with 38 million, and France with 24 million pounds. Considerable quantities were exported to the Netherlands, Argentina, Switzerland, Denmark and the Soviet Union. Of the total 1946 exports, 76 million pounds were shipped from Bahia, and about 36 million from Rio Grande. Figures for Bahia only are available for the first half of 1947.

Exports from that State for the first six months of this year totaled 18.8 million pounds, or less than one half the quantity shipped from Bahia during the corresponding period of last year. The principal purchasers of Bahia's leaf this year were Argentina, Spain, Italy, and France. The sharp decline in exports this year is attributed to foreign exchange shortages and high prices.

Stocks of leaf in Bahia as a result of the decreased export demand, reached 31.5 million pounds on July 1, 1947, compared with 27.5 million on the same date in 1946. Prices, however, were higher than a year ago. Growers received as much as 21 cents per pound for first quality air-cured leaf this year, compared with an average of about 17 cents last year.

In Rio Grande, prices for flue-cured were much higher than last season's. Farmers received as much as 34 cents per pound for Grade A flue-cured from the 1947 crop, compared with 30 cents a year ago. As a result of the short crop in that State this year, the market is extremely active, with strong competition between domestic and export buyers. Reports indicate that stocks of both flue-cured and light air-cured are considerably below those of a year ago. Domestic cigarette manufacturers depend almost entirely upon supplies of leaf from Rio Grande.

#### PHILIPPINE TOBACCO PRODUCTION REMAINS LOW

The 1947-48 tobacco crop in the Philippines is forecast at about 40 million pounds, from 86,000 acres. This is a 50 percent increase in production from last spring's harvest, but is still far below the prewar average crop of 75 million pounds. Production may reach the prewar level with the 1948-49 harvest.

During the first four months of 1947, leaf tobacco exports amounted to 2.9 million pounds, of which 2.3 million were destined to Spain. The United States, China and Belgium purchased the remainder. Exports during the corresponding period of 1946 totaled 1.7 million pounds. Prewar (1935-39) exports of leaf from the Philippines averaged 37.4 million pounds annually. Cigar exports during the first four months of this year amounted to 826,000 pieces, chiefly to Hawaii. Observers state that exports of leaf and manufactured tobacco will not reach prewar levels until 1950.

Cigarette imports, all from the United States, during the January-April period this year totaled 3.2 billion pieces. Since the close of the war, consumption of American cigarettes has been at record levels.



Imports of other tobacco products, chiefly chewing tobacco totaled 468,428 pounds for the same period.

There is no official estimate of stocks of tobacco on hand in the Islands, but it is believed there are not more than 31 millón pounds available. This is little more than sufficient to meet the current annual requirement of the Islands' tobacco consumers.

### TROPICAL PRODUCTS

#### CUBA MAY HAVE SURPLUS CACAO

Cuba's 1946-47 cacao crop is estimated at 6 million pounds, which is 20 percent larger than last season's production. The crop is of better quality than that of last year owing to the occurrence of rains at favorable times. The 1947-48 production is forecast at 7 million pounds which, if it materializes, will be the largest outturn since 1936.

Since 1941, no domestically produced cacao beans have been exported from Cuba. At present, export of domestic cacao is forbidden, although foreign beans brought into the free port of Matanzas may be reexported either in the raw form or in various manufactured products. Domestic production has been insufficient to meet consumption requirements; consequently beans and cacao products have been imported from time to time. Cacao merchants now state, however, that there is a surplus of 1.1 million pounds of cacao beans from the 1946-47 crop and are urging the Cuban Government to authorize its exportation. The Government has appointed a committee to study the situation and presumably will act according to its recommendations. Some observers believe the surplus is considerably less than 1.1 million pounds.

#### GRENADE'S CACAO CROP LOWER

The 1947-48 cacao bean production for the West Indian Island of Grenada is forecast at 4.8 million pounds compared with an outturn of 5.7 million pounds during 1946-47. Drought during the first half of 1947, ravages of the cacao beetle, and shortage of fertilizer are the reasons given for expecting a smaller outturn.

Grenada has approximately 27,000 acres devoted to cacao production with about 400 trees planted to the acre. The cacao is of high quality. During recent years, it has been allocated principally to the United States and the United Kingdom. Exports during the calendar year 1946 totaled 5.8 million pounds, compared with 6.5 million the previous year.

#### COLOMBIA'S AUGUST COFFEE EXPORTS HIGHER

Exports of coffee from Colombia during August amounted to 428,000 bags compared with the June low of 206,000 bags, and 277,000 bags in July.



January-August 1947 exports totaled 3,039,304 bags, or 584,000 bags less than during the corresponding period last year. The comparatively small exports in June and July were due in part to refusal of the Office of Exchange Control to register sales contracts below certain minimum prices. Port stocks as of August 21 were reported at 506,000 bags.

Colombia's total exportable coffee production during 1947 is still placed at 6.5 million bags. The main crop now being harvested in the Department of Antioquia is estimated at 800,000 bags. The *traviesa* or mid-crop harvested in the spring reached 400,000 bags. Coffee from both these crops is of good quality. Antioquia ordinarily produces about 15 percent of Colombia's total crop. In the Cali producing region in Valle del Cauca, the *traviesa* currently being gathered is unusually large and of excellent quality. Valle del Cauca usually accounts for about 13 percent of Colombia's coffee.

### COTTON

#### COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths  
and qualities in specific markets

Market location, kind, and quality	Date 1947	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria		: Kantar			
Ashmouni, Good.....	10-2	: 99.05 lbs.	: Tallari	: 39.50:	32.96
Ashmouni, F.G.F.....	"	: "	: "	: (not quoted)	
Giza 7, Good.....	"	: "	: "	: (not quoted)	
Giza 7, F.G.F.....	"	: "	: "	: (not quoted)	
Karnak, Good.....	"	: "	: "	: 46.00:	38.38
Karnak, F.G.F.....	"	: "	: "	: 42.75:	35.67
Bombay		: Candy			
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 435.00:	16.74
Broach, Fine.....	"	: "	: "	: 543.00:	20.90
Sind American, Fine....	"	: "	: "	: 553.00:	21.28
Punjab " 289-F, Fine	"	: "	: "	: 663.00:	25.52
Kampala, East African..	"	: "	: "	: 920.00:	35.41
Buenos Aires		: Metric ton			
Type B.....	10-4	: 2204.6 lbs.	: Peso	: 2590.00:	34.98
Lima		: Sp. quintal			
Tanguis, Type 5.....	"	: 101.4 lbs.	: Sol	: 156.00:	23.67
Pina, Type 1.....	"	: "	: "	: 193.00:	29.28
Recife		: Arroba			
Mata, Type 5.....	10-3	: 33.07 lbs.	: Cruzeiro	: 105.00:	17.27
Sertao, Type 5.....	"	: "	: "	: 115.00:	18.92
Sao Paulo		: "			
Sao Paulo, Type 5.....	"	: "	: "	: 156.50:	25.75
Torreón		: Sp. quintal			
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 131.25:	26.63

Compiled from weekly cables from representatives abroad.

LIVESTOCK AND ANIMAL PRODUCTS**SOME INCREASE EXPECTED IN  
ARGENTINE POULTRY INDUSTRY**

The production outlook for chickens and eggs in Argentina during the forthcoming spring and summer season is better than it was a year ago, but not as good as had previously been expected.

Feed supplies in the main commercial producing zones of Entre Rios have not been as plentiful as in other parts of the country and the federal government has made little progress with its reported plan to subsidize sales or at least facilitate deliveries of the lower-priced corn to poultry men. Meantime, the producer has not been satisfied with the egg price of 15-16 cents per dozen offered at the farms during the light current production season.

Another setback to present prospects was the failure of the Argentine Trade Promotion Institute to agree on terms for a new bulk contract for dried eggs. With the United Kingdom out of the market it is unlikely that the drying establishments will be operating during the current season. Some demand, however, is expected for shell eggs. Switzerland, Spain, Italy, Belgium and Peru have been reported as possible outlets for shell eggs. Export demand may reach a level of from 200,000 to 250,000 cases for the season as a whole. If there is no drying, the surplus available for export may exceed demand by a small margin.

The current hatch will be larger than a year ago, but will fall short of initial expectations. The reduced scale of the chicken industry the past year has resulted in a scarcity of hatching eggs this season. Some of the better egg producers on whom reliance has been placed in past years are now either out of business or working on a reduced scale.

**SOUTHERN HEMISPHERE WOOL EXPORTS  
LARGER - SMALLER TO UNITED STATES**

Wool exports from the five most important surplus producing countries of the Southern Hemisphere, which furnish roughly four-fifths of the world's exports, reached approximately 2.4 billion pounds in the 1946-47 season, just closing, or an increase of 18 percent above 1945-46. The increase was chiefly to Continental European countries. Shipments to the United States probably reached a little over 700 million pounds, a decrease of 27 percent compared with a year earlier. The estimates for New Zealand, Argentina and Uruguay are based on incomplete statistics as reports for the entire season are not yet available.

The British Dominions in the Southern Hemisphere (Australia, New Zealand and the Union of South Africa) increased exports about 41 percent above a year earlier. Interest in the first postwar season centered in the auction sales in London and the Dominions and the demand for superior fine wool was keen. In addition to current clip wool sales from United Kingdom, Dominion stocks were fairly large. Some of the wool sold in the 1945-46 season had not been shipped and was exported in 1946-47.



Argentine wool shipments were about 40 percent below last season's record when much of the coarse crossbred wool which had accumulated during the war was shipped out. Uruguayan exports were only slightly below the preceding season.

Australia increased shipments to the United States 6 percent above the large exports in the preceding season. New Zealand also sent more wool to the United States. South Africa reduced exports to this country by 57 percent but shipments from all three of these countries to the United States were materially above the prewar average.

There was a decided falling off of 57 percent in Argentine exports to the United States with Uruguay also showing some decrease.

WOOL: EXPORTS FROM FIVE PRINCIPAL SOUTHERN HEMISPHERE COUNTRIES,  
1946-47 with comparisons.  
(Actual weight greasy, scoured, and pulled.)

	Australia		New Zealand		Union of South Africa		Argentina		Uruguay		TOTAL	
	season beginning July 1		season beginning July 1		season beginning July 1		season beginning October 1		season beginning October 1			
	To U.S.	Total	To U.S.	Total	To U.S.	Total	To U.S.	Total	To U.S.	Total	To U.S.	Total
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.
Average:												
1934-38	26	287	15	263	2	231	53	305	15	115	111	1,741
1939	17	862	14	277	37	181	137	282	37	106	242	1,708
1940	278	537	3	199	29	60	349	418	120	145	779	1,359
1941	558	816	14	205	199	288	220	243	43	58	1,034	1,610
1942	348	557	15	205	38	100	153	178	98	105	652	1,149
1943	262	509	27	244	20	52	199	225	100	110	608	1,140
1944	260	562	33	123	21	88	199	266	174	204	687	1,243
1945	321	807	67	296	146	284	356	517	83	145	978	2,049
1946 a/	339	1,212	100	370	63	379	150	310	70	140	722	2,411

Compiled from official sources and reports from foreign service officers.

a/ Preliminary estimates for season based on incomplete statistics.

BRED SOWS IN DENMARK  
SHOW SEASONAL DECLINE

Total and bred sow numbers in Denmark, according to September 6th census, were reported at 198,000 and 107,000 head, respectively, compared with 191,000 and 117,000 head reported a year earlier. For bred sows this represents a decrease of 3 percent below a year previous. Some 15,000 sows were slaughtered in September compared with 11,000 last year. These facts, together with a critical feed situation, indicate a decrease in hog numbers and marketings next spring.

Hog numbers in September this year totaled 1,938,000 head, compared with the August 24, 1946 census of 1,851,000 head. This represents an increase of 4 percent over a year ago. The same comparison for other classes is suckling pigs 463,000 against 401,000, and pigs and slaughter hogs 1,268,000 against 1,250,000. The largest increase in hog numbers is reflected in young suckling pigs, indicating increased farrowings last spring.



FRUITS, VEGETABLES AND NUTS**BANANA PRODUCTION  
IN JAMAICA**

Banana production in Jamaica for 1947 is estimated at around 6 million stems, as compared with the final figures on Government purchases in 1946 amounting to 5,899,000 stems, and the record high in 1937 of 26,955,000 stems. Because of Panama disease, production in 1948 will probably not exceed that of 1947. Lacatan bananas (the Panama disease-resistant family) are being tested for disease immunity by being grown in Panama on disease-infected land. They also are being tested for quality of fruit, keeping qualities in refrigeration, and suitability for transportation to, and marketing in England. Notable success in these tests has been reported, but a substantial increase in production can not be expected for at least two years.

FATS AND OILS**U. S. FATS AND OILS  
EXPORTS DECLINE**

Exports of principal fats and oils (in terms of oil) from the United States totaled 426 million pounds during January-August, 22 percent less than in the corresponding months of 1946 despite increases in all vegetable oil exports except soybean. Inedible tallow was also larger. The decline was in oleomargarine and lard, which were considerably smaller than last year. European countries received 60 percent less lard, but shipments to South America and other North American countries exceeded those of 1946.

**UNITED STATES: Exports of specified fats, oils and oilseeds,  
January-August, 1947 with comparisons**

Commodity	Unit	Average 1935-39	1946	January - August 1946 : 1947	
Soybeans.....	1,000 Bu.	a/ 4,793:	2,906:	942:	1,138
Soybean oil:					
Refined.....	" Lbs.	b/ (6,467:	72,583:	51,375:	22,627
Crude.....	" "	13,228:	13,228:	6,281:	24,286
Coconut oil:					
Refined.....	" "	3,789:	935:	27:	2,782
Crude.....	" "	10,442:	47,366:	43,847:	43,676
Cottonseed oil:					
Refined.....	" "	4,793:	5,857:	2,322:	2,779
Crude.....	" "	1,515:	244:	243:	21
Linseed oil.....	" "	1,280:	1,625:	1,458:	1,576
Peanuts:					
Shelled.....	" "	b/ (452:	61,043:	27,146:	125,208
Not shelled.....	" "	7,066:	7,066:	3,430:	14,351
Cooking fats.....	" "	2,111:	11,424:	9,329:	2,664
Lard.....	" "	165,636:	430,682:	373,567:	214,731
Oleomargarine.....	" "	180:	50,483:	29,649:	14,011
Tallow:					
Edible.....	" "	b/ (1,651:	4,151:	3,736:	263
Inedible.....	" "	6,472:	6,472:	4,941:	29,684

Compiled from official sources. a/ Average of less than 5 years.

b/ Not separately classified in Foreign Commerce and Navigation.

UNITED STATES: Lard exports, January-August 1947, with comparisons					
Country of destination	Average : 1935-39	: 1946	: January - August 1946	: 1947	
	: 1,000	: 1,000	: 1,000	: 1,000	
	: pounds	: pounds	: pounds	: pounds	
North America:					
Canada.....	2,008	4,103	4,103	12,644	
Cuba.....	39,912	72,013	42,958	49,479	
Mexico.....	5,500	19,138	12,335	19,530	
Panama.....	1,032	1,750	988	1,139	
Others.....	3,508	5,138	3,364	5,910	
Total.....	51,960	102,142	63,748	88,702	
South America:					
Colombia.....	3,740	2,555	2,036	4,645	
Ecuador.....	800	491	207	1,930	
Venezuela.....	3,220	2,655	1,956	3,194	
Others.....	66	39	1	2,015	
Total.....	7,826	5,740	4,200	11,784	
Europe:					
Czechoslovakia....	1,654	13,100	13,100	9,859	
Finland.....	250	796	560	6,240	
France.....	28	111,680	109,279	28,540	
Germany.....	2,536	1	1	521	
Italy.....	708	19,982	19,711	18,124	
Poland.....	40	19,360	19,359	13,676	
Switzerland.....	218	0	0	1,735	
United Kingdom....	95,732	66,305	56,703	24,419	
Others.....	4,486	59,541	55,371	10,171	
Total.....	105,652	290,765	274,084	113,285	
Other continents....	198	32,035	31,535	1,010	
Grand total.....	165,636	430,682	373,567	214,781	

Compiled from official sources.

NOTE: U. S. Import Data on Fats and Oils Will Appear in Foreign Crops and Markets October 20.

#### AUSTRALIA PRODUCES RECORD PEANUT CROP

Peanut production for 1947 in Queensland, Australia, will exceed 22,000 short tons, the largest output on record, according to current estimates. Plantings amounted to 52,800 acres compared with 32,000 in 1946 and 14,500, the prewar (1936-40) average acreage. This year's crop exceeds last year's by 49 percent and the prewar average by 47 percent.

Practically all of the Australian peanut production is concentrated in Queensland. Growers sell the nuts to the Queensland Peanut Board, a Government controlled organization, receiving in 1945 and 1946, 3.85 d. (5.2 cents) and 4.13 d (5.5 cents) per pound, respectively. The market prices at which wholesalers obtained peanuts from the Board were 4.50 d (6.0 cents) and 4.80 d (6.4 cents) per pound, for the same years.

The present crop is insufficient to meet the Commonwealth requirements and is rationed by the Board to each individual state. If normal weather conditions prevail, the 1948 harvest is expected to greatly surpass this year's production.



## ARGENTINE ANIMAL FAT EXPORTS INCREASE

Argentina's January-July tallow exports were 37,600 short tons compared with 29,300 in the same months of 1946. In both periods the bulk of the trade was with European countries. Of the 1947 shipments the United Kingdom and Spain received 29 and 10 percent, respectively, and the Soviet Union 12 percent. Less than four percent was destined to North America as against 32 in 1946. Lard exports, amounting to 14,200 tons, exceeded those of 1946 (January-July) by approximately 1,600 tons. As was the case with tallow, the largest quantity went to Europe, principally to Italy, the United Kingdom, and Hungary.

The Argentine Trade Promotion Institute is the sole purchaser and seller of both tallow and lard for export. Recent reports indicated that the Institute's asking price for lard during August was 4.40 pesos per kilogram (59.4 cents per pound) f.o.b. Buenos Aires and 2.70 to 2.80 pesos (36.5 to 37.8 cents) for tallow.

## ECONOMIC DEVELOPMENTS

### MONOPOLY CONTRACTS FOR BANANA EXPORTS IN HAITI

A new law, recently enacted by the Government of Haiti, provides machinery for increasing production and facilitating exportation of bananas by means of monopoly contracts that may be concluded for a period up to 12 years. These contracts are subject to cancellation on failure of fulfillment of stipulations, subject to review in the civil courts. The contractor must agree to pay the withholding tax and royalties, on the bananas he buys, to the Government at the customhouse at the time of shipping the fruit. At least 80 percent of salaries, over and above labor costs, must be paid to Haitians. Within the zone covered by his contract, each contractor must (1) aid in developing the production of bananas of a specified variety or varieties; (2) contribute to the treatment of plant diseases; and (3) share in the expenses of road construction, maintenance, and improvement. He must buy the entire crop of merchantable bananas in his zone, of the varieties and grades specified in his contract, and must set up buying stations in any accessible area producing 1500 stems or more per month.

The lowest price the contractor may pay the producer is to be fixed by the Secretary of Agriculture in a weekly communique on the basis of the average price offered in foreign markets, after making due allowance for marketing expenses and the withholding tax. On the other hand, the contractor has the sole right to purchase bananas for export in his zone and to export them, the only exception being that a planter who cultivates 100 hectares or more in one township and uses modern methods has the right to export his own fruit. Equipment for initial installations may be exempted from import duties for the first two years. No action in awarding new contracts was expected before October.